

Overview: Anthology Raise and Encompass Integration

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Information

The topics in this section provide an overview of Anthology Raise and Encompass solutions and how the two systems are integrated.

About Anthology Raise

Anthology Raise is built on the Microsoft Dynamics CRM platform and is an advancement donor management platform built to provide tools, insights and actions that improve customer's workflow and deliver more gifts. In addition to managing institutions constituent relationships, prospects, and even volunteers, this innovative platform features gift processing and recording, donation tracking, call center integrations, and more.

About Encompass

Encompass is an integrated platform for fundraising, communication, and engagement that helps institutions to build and sustain lifelong relationships with alumni and supporters. Encompass is used by more than 800 higher education institutions to drive larger gifts, increase event attendance and membership, and improve participation rates through data-driven, meaningful engagement.

Benefits of Integrating Anthology Raise and Encompass

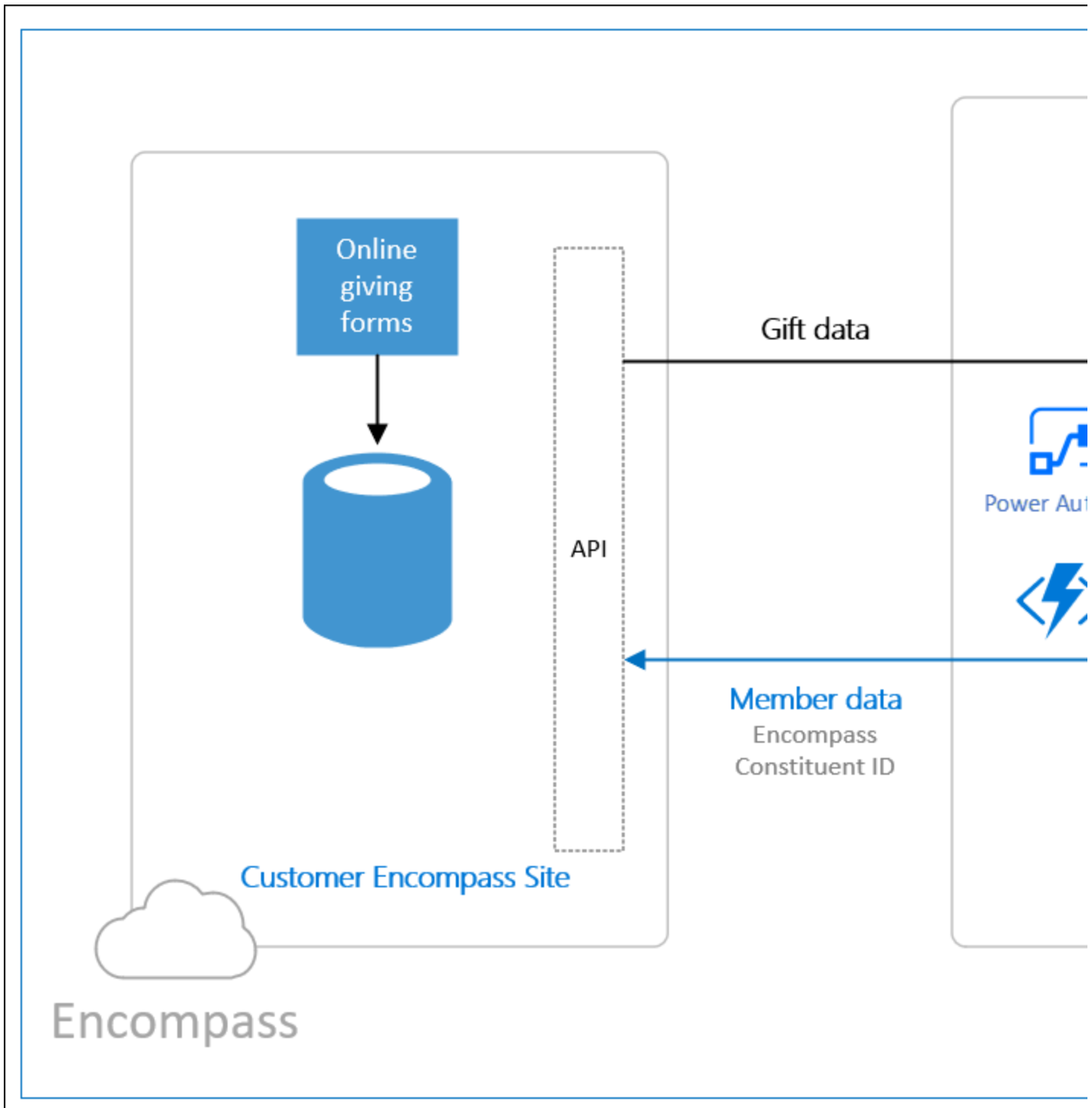
Integrating the data between Anthology Raise and Encompass solutions enable institutions to have the most relevant and up-to-date information about their constituents and manage fundraising.

Through web services, Anthology Raise and Anthology Encompass provide an integrated solution to provide you the most up-to-date data about your constituents and fundraising.

- Automatically update member profile information in Encompass from Raise constituent data including (first and last name, address, phone numbers, email, and more)
- Seamlessly stream online giving transactions from Encompass into Raise, including all payment types, tributes, matching gifts, and designations.
- Powerful in-application field mapping utilities provide easy access to the data mapping – predefined field mapping templates are included to get started quickly, and then you can modify or extend to suit your business needs.

Anthology Raise and Encompass Integration Architecture

The following diagram describes the Anthology Raise and Encompass integration architecture.



Data integration between Anthology Raise to Anthology Encompass uses web service calls sent by the Anthology Raise system to send and retrieve data.

Power Automate Flows in Anthology Raise run on a schedule and use criteria defined in the Flow to identify any new contacts added to the system that should be sent to Encompass. Integration messages with integration category of “Encompass” are assembled from the configurable field mappings defined in integration templates. A Power Automate Flow runs per separate recurrence schedule to send outgoing web service requests via an Azure Function. Encompass API credentials are configured in the Azure Function. Flow triggers when updates are made to contacts who are already integrated in Anthology Raise and create outgoing integration messages which then get sent to Encompass. Additional Flows make web service requests to retrieve gift transactions from Encompass and create incoming integration messages containing a

json payload for each incoming transaction. A separate Power Automate Flow runs per separate schedule to process and post each gift transaction to the respective Anthology Raise tables. The Integration Log entity in the system logs the status of the integration message. The integration message stores the outgoing and incoming messages. Any errors returned from the web service requests are show in the integration message details.

All Anthology Raise constituent contacts will have a 10 digit auto-numbered Encompass Constituent ID value which is sent to Encompass with every create or update request. Contacts which are integrated will also have an Encompass Member ID value containing the imod_member_id value from Encompass; at the time a create member request is sent to Encompass, the generated imod_member_id value is returned by the web service and saved to the Anthology Raise contact Encompass Member ID field.

For more information on Encompass WebServices, see [iModules Web Services 2.1 – Engineering Documentation – Encompass Support Center](#).

Predefined Field Mapping Templates

The data integration between Anthology Raise and Anthology Encompass includes predefined field mapping templates that are used for integrating the data between Anthology Raise and Encompass.

The following fields are mapped:

- Member data field mappings
 - Work experience data field mappings
 - Education data field mappings
- Gift transaction data field mappings

For more information on the field mappings and the templates used for data integration between Anthology Raise and Encompass, download the following Microsoft Excel file:

- [Encompass-Anthology RaiseFieldMappings.xlsx](#)

KB Product

Encompass

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